

***ECONOMIC SECURITY  
TASK TEAM REPORT TO  
THE CALIFORNIA  
COMMISSION ON AGING***

Prepared for  
**PLANNING FOR AN AGING  
CALIFORNIA: AN  
INVITATIONAL FORUM**  
March 8, 2005

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## The Purpose

The purpose of this document is to provide a status report of the work of a stakeholder task team on Economic Security organized around working on implementation of “Planning for an Aging California Population” (Health and Human Service Agency October 2003).

## Task Team Members

Bonnie Parks, Chair	Executive Director, Senior Worker Advocate Office
Aimee Durfee	Program Specialist, National Economic Development and Law Center
Anni Chung	Self Help for the Elderly
Betty Jansson	Executive Director, Women at Work
Carroll Estes	UCSF Institute for Health and Aging
Carol Lamont	San Francisco Foundation
Cathy Leibow	President, FamilyCare, Inc.
Dianne Yamahshiro-Omi	Program Officer, The California Endowment
Helen Karr	Commissioner, California Commission on Aging
Jenni Chen Hansen	On Lok Senior Health Services
Jenny Erwin	Regional Administrator, U.S. Department of Labor
Judy Bloomfield	Director, One Small Step
Judy Patrick	Vice President of Programs and Operations, The Women's Foundation
Kathleen Cha	President-Elect, AAUW
Leah Wyman	Commissioner, California Commission on Aging
Mary O'Hara-Devereaux	President and CEO, Global Foresight
Mary Wiberg	Executive Director, Commission on the Status of Women
Nicholas de Lorenzo	CA State Director, The National Council on Aging

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**Task Team Members  
(Continued)**

Sally James	Work Source California
Shirley Sidd	Older Women's League
Sue Cochran	California State President, AAUW
Susan Houston	Director of Senior Services, Family Service Agency of San Mateo County
Vicky Barker	Legal Director, California Women's Law Center
Tom Porter	State Director, AARP California
Stephen M. Wing	Director Government Programs, CVS Corporation

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## Table of Contents

	<u>Page</u>
I. Forward.....	1
II. Background on Economic Security.....	3
III. Current Status of Economic Security Task Team .....	3
IV. Economic Security Implementation Priorities and Action Plan .....	4
V. Barriers to Implementation of Economic Security Priorities.....	9
VI. Proposed Revisions to the <i>Strategic Plan for an Aging California Population</i> .....	10

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## I. Forward

### A. Who is the California Commission on Aging?

The California Commission on Aging (CCoA) was established in 1973 by the Burton Act. It was confirmed in the original Older Californians Act of 1980 and reconfirmed in the Mello-Granlund Older Californians Act of 1996.

The Commission serves as "*the principal advocate in the state on behalf of older individuals, including, but not limited to, advisory participation in the consideration of all legislation and regulations made by state and federal departments and agencies relating to programs and services that affect older individuals.*" As such, the CCoA is the principal advisory body to the Governor, State Legislature, and State, Federal and local departments and agencies on issues affecting older Californians.

### B. SB 910—Aging Planning Legislation

California is home to nearly four million people over age 65—the largest older adult population in the nation. This number is expected to more than double over the next several decades as the baby boomers begin reaching this milestone. To address this impending reality, Senator John Vasconcellos wrote Senate Bill 910 (Ch. 948/99, Vasconcellos). The bill mandated that the California Health and Human Services Agency develop a statewide strategic plan on aging for long term planning purposes. On October 14, 2003, the *Strategic Plan for an Aging California Population—Getting California Ready for the Baby Boomers*, was completed with the major support of the CCoA and a plan development task team representing 25 older adult stakeholder organizations supported by 15 state departments. The Governor signed the plan in November 2003. (The Strategic Plan can be reviewed at [http://www.calaging.org/works/population\\_files/population.pdf](http://www.calaging.org/works/population_files/population.pdf).)

### C. CCoA's Monitoring Role of the Strategic Plan

SB 910 calls for periodic updates so that it can be continuously improved and reflect new circumstances, new opportunities and the changing socio-political environment. The CCoA agreed to assume responsibility for the monitoring and updating the Strategic Plan. In this capacity, the CCoA is responsible for convening stakeholders, holding meetings, and monitoring the progress of priority action items outlined in the Plan. The CCoA will report to the Legislature the progress of the Plan's implementation, and update the Plan's contents to reflect changing priorities and actions. Reports to the Legislature will be on a biennial basis.

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The CCoA's approach to monitoring the Strategic Plan's implementation during 2003-2005 includes:

- Encouraging/facilitating work on Strategic Plan implementation by convening nine new stakeholder task teams, facilitating initial meetings and establishing partnerships with two previously formed stakeholder teams.
- Dialoguing with state officials at the March 8, 2005 Forum on the top 15 priorities in the Strategic Plan.
- Distributing and compiling the results of a baseline questionnaire on the Strategic Plan's 15 Priorities. The questionnaire was distributed to private, public and non-profit providers and aging advocates.
- Reporting to the Legislature by May 2005, on the progress of the Strategic Plan.

#### **D. Stakeholder Task Teams**

Eleven Stakeholder Task Teams have been charged with identifying and focusing efforts on several of the top priority recommendations, developing action plans to support or achieve implementation of these priorities and identifying necessary amendments or additions to the original Plan. These volunteer Task Teams have been meeting for the period October 2003 through December 2004, though some Task Teams started their efforts later than others. Written reports have been received from all Task Teams—copies are available from the CCoA office. The focus areas for the 11 stakeholder task teams are: Housing, Economic Security, Elder/Financial Abuse, Transportation, Wellness/Prevention, Mental Health, Oral Health, Long Term Care, Palliative/End of Life Care, Assistive Technology, Provider Workforce.

The choices and actions taken by the Task Teams are solely their own and do not necessarily represent the position of the CCoA.

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**Strategic Plan for an Aging California Population**  
**Report to the California Commission on Aging**  
**March 8, 2005**

**Economic Security Task Team**

**II. Background on Economic Security**

By 2005, there will be about 55 million workers age 45 and older, or about 37 percent of the labor force according to the Bureau of Labor statistics. University studies show that the longer “baby boomers” are employed, the greater the economic benefit to the State in both reduced costs of social programs and the increased tax revenues generated.

The AARP has documented that older adults face barriers to employment because of stereotypes about their abilities and because of lack of updated training. Information on how to proactively reduce those barriers assists older workers to obtain jobs.

In addition, Assembly Member Patty Berg, Chair of the Assembly Committee on Aging and Long-Term Care will develop a master plan for legislation that will be addressing economic security issues. The Committee has issued an Executive Summary and page 4 addresses Employment, Finance, and Retirement. It states that policymakers will need to support individuals’ continuance in the labor force for as long as they need to or want to work. One of the key questions asked on page 11 is, “How can we help empower individuals to remain as independent and engaged as possible for as long as possible?” Work is a major factor in addressing this issue.

**III. Current Status of Economic Security Task Team**

The Task Team began its work in June 2004, by reviewing the *Strategic Plan on an Aging California* including the full list of Economic Security recommendations. The Task Team worked through a selection process to identify three implementation priorities. The priorities represent what the Task Team members felt could be reasonably accomplished in the current environment. For each of these priorities, an Action Plan was created. As a final step, the Task Team compiled a list of barriers that hinder implementation. Task Team members are listed on page i of this document.

The Task Force goal is to support programs that aid older workers to continue in the labor force for as long as they need to or want to work. To achieve this, the Task Force is striving to improve coordination between organizations that provide job-related supportive services for older workers including job placement, job skills training, and financial planning.

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Members of the Task Team are working more closely together to support the individual programs of each member and to improve the coordination and effectiveness of the various programs as a whole. The following is a summary of the programs and services identified by the Task Force that assist older workers to enter or remain in the workforce and their progress in 2004.

The Task Team will make a continuing effort to improve public access to resources by networking with each other. The process of creating a summary of services has educated the members of the Task Team about some of the programs they were not aware of.

In addition, the Transportation Task Force impacts the Economic Security priorities because older workers can not work if they have no transportation. One member of the Senior Worker Advocate Council is serving on the Transportation Task Force to insure that work issues are incorporated in the discussions.

#### **IV. Economic Security Implementation Priorities and Action Plan**

<b>Priority</b>	<b>Action Plan</b>
Encourage employers to develop flexible work option plans	<ul style="list-style-type: none"><li>• Employers should develop mechanisms for improved work options including flexible scheduling, compressed work week, job sharing, part time/on call employment, "V-time" or voluntarily taking a portion of the year off, and telecommuting.</li><li>• Provide incentives by offering prorated health benefits to part time employees.</li></ul>

Priority	Action Plan
Encourage employers to develop flexible work option plans (continued)	<p><b>Progress to date:</b> The U.S. Department of Labor, Women’s Bureau has a workplace flexibility initiative called, Flex Options. This program works to get women owned businesses to start or expand flexible policies and practices for their employees. There are bimonthly national conference calls that feature best practices and role models. There are also working sessions that help business owners understand the various flex programs and how to get started.</p> <p>The Employment Development Department (EDD) Senior Worker Advocate Office provides various educational materials to assist employers, and older workers. The SWAO designed an Employer Tool Kit to assist employers in implementing age neutral -employment policies that will create flexible work places to meet all employee needs including older workers. The contents are based on input from the EDD Senior Worker Advocate Council (SWAC), the California Employer Advisory Council (CEAC) and business forums conducted by the U. S. Department of Labor. It includes best business practices to:</p> <ul style="list-style-type: none"> <li>a) Create flexible work places to meet employee needs Recruit employees with specific skills including older workers</li> <li>b) Retain skilled employees of all ages</li> <li>c) Address older worker stereotypes</li> <li>d) Support training to maintain skill levels at all ages</li> </ul> <p>The Employer Tool Kit is available on the EDD web site and has been marketed through the EDD California Employer, which is sent to every business in California. The Senior Worker Advocate Council, the California Employer Advisory Council and the California Coalition of Working Women have also shared it with their members. It has also been distributed to the members of the Economic Security Task Force for the <i>Strategic Plan for an Aging California Population</i>.</p> <p>The SWAO redesigned and improved automated educational materials on its web site to increase the accessibility and relevance of educational materials to older workers, job placement professionals, employers, and its partners. The SWAO solicits continual feedback to make the materials more useful to its stakeholders.</p>

Priority	Action Plan
<p>Take Action to eliminate age discrimination</p>	<ul style="list-style-type: none"> <li>• Change negative stereotypes of aging that exist in the media, and throughout society by incorporating issues of diversity and elder involvement into the Stay Well public information program and on the Industry Coalition on Age Equity and the Media (ICAEM) agenda.</li> <li>• Strengthen and reinforce current employment law with regard to age discrimination by:               <ol style="list-style-type: none"> <li>1) Expansion of employers awareness of the law</li> <li>2) Clarification of who enforces the law</li> <li>3) Strengthening enforcement procedures</li> <li>4) Strengthening employee rights</li> <li>5) Clarification and simplification of how employees file complaints</li> </ol> </li> </ul> <p><b>Progress to date:</b> The Industry Coalition on Age Equity in the Media (ICAEM) works with the entertainment industry to improve the image of older adults that is portrayed by television and films. ICAEM works to have the portrayal of aging adults reflect the reality of a more active, creative, healthy and vital segment of society. The</p> <p>The AARP conducts surveys on major aging issues including the financial security of adults age 50 and over. The results of these surveys provide data on the need of adults over 50 to work. Because of this growing need for its members, AARP has established a list honoring the “Best Employers for Workers Over 50”. These companies and organizations, recognized for their best practices and policies for valuing the mature worker, are roadmaps for the workplaces of tomorrow. These employers are listed on their web site. EDD refers older workers to the California companies on the AARP list.</p> <p>The EDD Senior Worker Advocate Office conducts and supports various projects to address age discrimination in employment. The Stay Well public information program conducted by the California Department of Aging (CDA), The Senior Worker Advocate Office (SWAO) has partnered with the CDA to distribute positive images of aging by assisting distribution of the program information through the EDD partner One-Stop Career Centers.</p>

Priority	Action Plan
Take Action to eliminate age discrimination (continued)	<p>The SWAO organizes the Governor’s Older Worker and Exemplary Employer Awards Lunch during Older Americans Month in May. The Awards publicly recognize outstanding older workers and the employers who hire them. Statewide media coverage of the awards in newspapers and newsletters increase employer knowledge of successful business practices in employing senior workers. The SWAO partners with various public and private organizations including the SWAC, California Chamber of Commerce, CEAC, The California Department of Aging and the AARP to support the Awards.</p> <p>The SWAO trained over 150 One–Stop Career Center Staff from October 2003 to 2004 in response to local requests. The SWAO “Silver Tool Box” trains One-Stop Career Center staff and other local partners on how to assist older workers to overcome age discrimination barriers to employment.</p>
Provide job training and support for job seekers	<ul style="list-style-type: none"> <li>• Consolidate and revitalize private non-profit and community-based organizations’ older worker programs.             <ol style="list-style-type: none"> <li>1) Eliminate service fragmentation and add an older worker advocacy component.</li> <li>2) Provide culturally relevant, job-related supportive services for older workers including:                 <ol style="list-style-type: none"> <li>a. Personal and job counseling</li> <li>b. Job referral services</li> <li>c. Resume/job applications and supportive services to include:                     <ul style="list-style-type: none"> <li>○ Interviewing skills</li> <li>○ Transportation</li> <li>○ Health management</li> <li>○ Appropriate supports for persons with disabilities</li> </ul> </li> <li>d. Establish or revitalize job development relationships with business and labor.</li> </ol> </li> </ol> </li> </ul>

Priority	Action Plan
Provide job training and support for job seekers (continued)	<p>e. Coordinate relationships with educational institutions to provide appropriate opportunities for career enhancement, job training, retraining, and skill development.</p> <ul style="list-style-type: none"> <li>• Community College/Adult Education Job Support Programs:               <ol style="list-style-type: none"> <li>1) Implement senior curriculum and services through the Community college system that will provide an array of educational and counseling options to help California's older residents enhance their skills and therefore, their opportunities to find and keep jobs.</li> </ol> </li> <li>• CSU and university of California Job Support Programs:               <ol style="list-style-type: none"> <li>1) Offer Extension courses that meet the needs of older working students who need to upgrade skills and/or participate in certificate programs in order to enhance career change/employment options.</li> <li>2) Expand offerings over the Internet, grant work/life credits toward earning a degree, and similar creative methods to support the continuing education needs of the aging workforce.</li> </ol> </li> <li>• Employers develop/provide internal career coaching, mentoring development programs.</li> </ul> <p><b>Progress to date:</b> The Senior Community Service Employment Program (SCSEP) is a federally funded training and employment program limited to individuals who are 55 years of age and older and whose income is within 125 percent of the poverty level. Some of the SCSEP programs provide culturally diverse programs, however resources are limited and the culturally diverse population in California is growing. EDD partners with SCSEP to refer older workers to them who require culturally relevant, job-related supportive services.</p> <p>Adult Ed and Higher Education Institutions are responding to the aging student body by offering extension courses, certificate programs, internet courses, and work/life credits toward earning a degree. The SWAO provides information on job training resources to older workers, employers and other partners.</p>

Priority	Action Plan
Provide job training and support for job seekers (continued)	<p>One-Stop Career Centers provide universal service to all individuals who are seeking training and employment. They partner with EDD and the SCSEP program and often partner with community colleges and adult education programs to refer older workers to low cost training. SWAO staff respond to daily telephone calls and e-mails from older workers requesting assistance in obtaining employment. The SWAO refers them to local organizations including the Career Centers. The EDD Senior Worker Advocate Office partners with many public and private organizations to increase coordination of efforts to assist older workers. The major partnerships include:</p> <ol style="list-style-type: none"> <li>a. Older Worker Week Job Fairs—The SWAO staff coordinate Job Fair materials for older workers for National Employ an Older Worker Week in September. The SWAO partners with the EDD Job Service Division and Workforce Development Division, the California Department of Aging and the U. S. Department of Labor to distribute materials to EDD Job Service Field Offices, One-Stop Career Centers, the AARP and Senior Community Service Employment Offices in California.</li> <li>b. California Career Planning—The SWAO partners with educational institutions to provide appropriate opportunities for career enhancement, job training, retraining and skill development for older workers. The SWAO initiated and developed older worker segments for the 92 page statewide California Career Resource Network (CalCRN) guide that was previously oriented only for younger workers. The CalCRN includes Adult Ed and Higher Education Institutions. EDD partnered with CalCRN to revise the guide, which is distributed to thousands of career counselors, students, job seekers and educators in California through a federal grant.</li> </ol>

**V. Barriers to Economic Security Priorities Implementation**

The most significant barrier is lack of resources. Budget constraints make it difficult to implement and sustain support and educational programs aimed at both employers and older workers.

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**VI. Proposed Revisions to the *Strategic Plan for an Aging California Population***

The Economic Security Task Team has no suggested plan revisions.